

# New Hampshire State Airport System Plan

## Regional Meetings



McFarland Johnson



THE Louis Berger Group, INC.



# Agenda

- **System Plan Background**
- **Process and Key Findings**
- **System Recommendations**
- **Economic Benefits**
- **Next Steps**



# Previous System Plan

- **Completed in 2003**
- **Economy and Aviation Have Changed**
- **Addressing Operational and Financial System Needs**
- **Highlighting Economic Contribution of Aviation System for NH**

# NHSASP Goals & Objectives

- **Maximize Economic Value of NH's Airport System**
- **Provide a Safe, Secure and Efficient Aviation System**
- **Promote and Educate the Importance of the State's Aviation System**
- **Enhance, Preserve, and Maintain State Aviation System Assets**
- **Maximize Diverse Connectivity for State's Aviation Users**

# *Process*

# Elements of the System Plan

- **Evaluation Criteria and Defining Airport Roles**
- **Comprehensive Inventory Process**
- **Developing Aviation Forecasts**
- **Assessing Existing Statewide Airport Performance**
- **Defining Future Statewide Airport Performance**
- **System Recommendations**
- **Economic Analysis**

# ***Airport Recommendations***

# Recommendations Background

## ■ Airport Recommendations

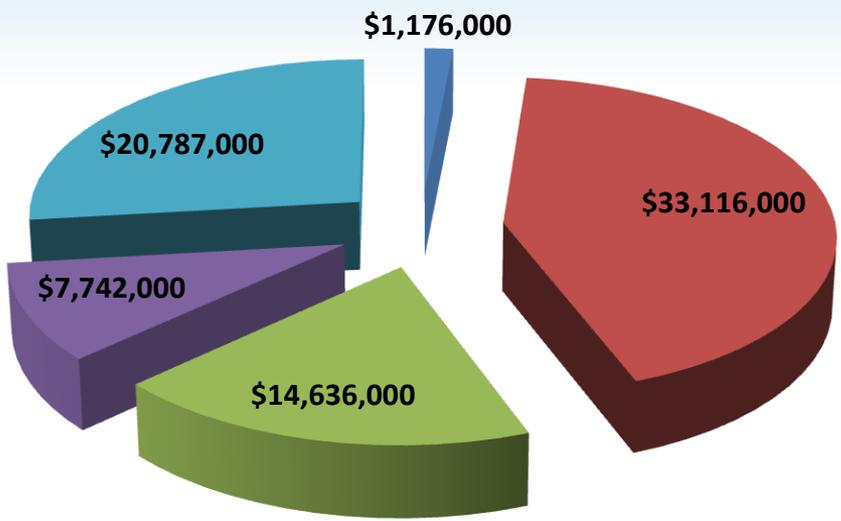
- System Plan = Supporting Planning Document
- Master Plans Provide Detail and Justification
  - Current ALP Still Required to Fund Projects
- Projects Phased Over Twenty Year Planning Period

## ■ System Recommendations

- Statewide Initiatives and Strategies
- Best Practices
- Airport Management Tools

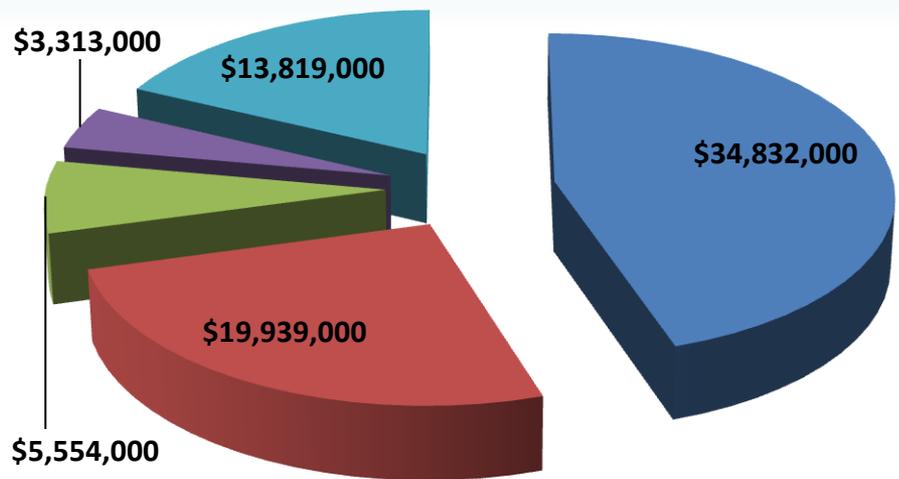
# Development Costs Breakdown

Total \$77,475,000



- Basic
- Local
- Regional
- National
- Primary

Total \$77,475,000



- Airside
- Landside
- Visual/Navigation Aids
- Studies/Surveys

# Other Airport Funding Needs

- **Projects in Addition to SASP - \$372,250,000**
  - \$138.9 Million Primary, \$94.4 Million Block Grant
    - Additional Hangars/Aprons/Taxiways
    - Passenger Terminal Facilities/Infrastructure
    - Additional Vehicles/Equipment (ARFF/SRE)
- **Pavement Maintenance - \$51,500,000**
  - Notable Cost Over 20-Year Period
- **Planning/Envi/Specialty Studies - \$8,000,000**

***TOTAL 20-YEAR AVIATION NEED IS APPROX.  
\$500,000,000***

# ***System Recommendations***

# Funding Program Needs

## ■ FAA Funding

- NH Has: 11% of NPIAS Airports and 10% of Funding in NE
- \$15 Million Annual Average 2009 - 2014
- Annual Levels Fluctuate - \$4M - 2014, \$30M – 2011

## ■ Other Funding (Non-NPIAS)

- RSA 422:36 Airways Toll Moneys; Aircraft Operating Fee Revenues – ¼ Turnback
- 80/20 Funding Program – Unfunded
- Airport Tax Reimbursement Program – Unfunded
- Fuel Revenue – General Fund
- State Aeronautical Fund – Donations (\$1,100)

# Funding Program Needs (Cont.)

## ■ Recommendations:

- Plan on Limited Funding Being A Reality
- Prioritize Projects – Meet Both System Recommendations and Local Needs
- Maintain Registration Fee Turnback – Airports Depend on for Budgeting
- Refocus Efforts to Refund 80/20 Program (Legislative)
- Research Funding Programs In Other States

# Policy Development

- **North Conway Airport Coverage Gap Options**
  - **Modify Bi-State Authority**
  - **Build New Airport (\$15M - \$20M Investment)**
- **Airport Land Use Planning & Zoning**
- **FAA Airport Design Standards Recommendations for Non-NPIAS Airports**
- **Equipment Purchases – Evaluate Options to Purchase Equipment for System Use**
- **Unmanned Aerial Systems (UAS)**

# Airport Tools/Resources

- **Airport Strategy Guidance – Maximize Aviation and Non-Aviation Revenue Generation**
- **Environmental Background – Understand the Federal and State Level Processes, Wildlife Hazards, Vegetation Management**
- **Airport Management – Guidance on Strategies to Manage and Operate Airports**
- **Safety and Security – Best Practices Including TSA Recommendations**
- **Checklists for All Airports**
  - Airport Emergency Plans
  - Airport Self Inspections

# ***Economic Impact***

# Methodologies & Assumptions

- **IMPLAN Model Used to Calculate the Multiplier Effect**
- **On-Airport Employment – Surveys**
- **Airport Capital Spending – NHDOT & Airport Management Survey**
- **Airport & Tenant Operations and Maintenance Spending; Surveys & Similar Airport Data**
- **Visitors & Visitor Spending – Visitor Surveys & MHT Data (*Extrapolated*)**
- **Travel Time Savings (*For Both General Aviation & Commercial Service Airports*)**
  - **Average Number Of Passengers Per Business Flight**
    - 3.4
  - **Travel Time Savings**
    - 2 Hours to & from Their Destination
  - **Value Of Travel Time**
    - \$59/Hour
- **Assumptions Considered Data Collected from NH & Recent Industry/Economic Studies Conducted in New England**

# Total Economic Impact of NH Aviation

	New Hampshire Businesses	Jobs	Travel Time Savings	NH State Tax Revenues
	Output/Sales Revenue			
<b>Primary Airports</b>	\$1,054,580,000	8,451	\$3,620,000	\$25,200,000
<b>General Aviation Airports</b>	\$100,840,000	780	\$10,470,000	\$1,340,000
<b>National</b>	\$46,400,000	351	\$3,200,000	\$770,000
<b>Regional</b>	\$45,520,000	357	\$6,230,000	\$450,000
<b>Local</b>	\$4,930,000	40	\$940,000	\$60,000
<b>Basic</b>	\$910,000	9	\$90,000	\$50,000
<b>Aircraft Registration</b>				\$1,100,000
<b>Total NHSAS</b>	<b>\$1,155,420,000</b>	<b>9,231</b>	<b>\$14,090,000</b>	<b>\$27,640,000</b>
<b>Aerospace Manufacturing</b>	\$998,900,000	3,671		\$4,230,000
<b>Grand Total</b>	<b>\$2,154,320,000</b>	<b>12,902</b>	<b>\$14,090,000</b>	<b>\$31,870,000</b>

# *Next Steps*

# Next Steps

- **Individual Airport Summaries**
- **Final Report Production**
- **Completion of Regional Meetings**
- **Posting Final Report on Bureau of Aeronautics Website:**

<http://www.nh.gov/dot/org/aerorailtransit/aeronautics/documents.htm>

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